



Oaklea

Supporting stronger communities

www.oakleatrust.co.uk

**Annual
Report 2017**

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View our online report at...

WELCOME



Welcome to our first digital annual report! Oaklea constantly reviews our impact on the environment and our

carbon footprint and hope that this, our first interactive digital report, demonstrates our commitment and provides an interesting and informative link for you to find out about the Oaklea Group and what we do.

This is my first annual report as acting chair having taken over from Barbara Osborne in June 2017. I would like to take this opportunity to thank Barbara for her leadership of our organisation over the last 10 years.

I have been involved with Oaklea as a trustee since around

2007 and became vice chair in 2011 and now acting chair. I am passionate about supporting Oaklea to achieve successful outcomes for our customers and some of this is personally driven as my daughter lives in supported accommodation with Oaklea!

There have been some significant changes in the last 12 months which has seen growth for our CIC Right2Work based in Kendal who now support over 150 people finding employment as well as increasing the number of skill types being taught at the Kendal day opportunities base.

The Appleby Hub is going from strength to strength with the café now open 4 days a week and so many partnerships with other local groups and charities being developed.

New initiatives have been developed by our employee teams

and customers across the north of England linking customers with their communities; from making and selling jam to becoming dementia champions or planning the provision of day time activities to reduce loneliness and isolation.

This has been a successful year with the charity meeting its objectives and achieving a good financial surplus although there has been some refocus and consolidation of certain areas of operation. We will continue to focus on meeting the needs of our customers; to believe that our role is to listen, try harder and change as we need to, ensuring we provide excellent support to the people we work for and the communities in which they live.

Cate Grimes

Acting Chair of Trustees

OUR VISION



Oaklea's vision for the future focuses on three key areas.

The development of stronger communities; building

further on the initiatives that enhance the lives of our elderly population by providing bespoke living accommodation, excellent levels of care & support and meaningful community activities; enabling our customers to pursue hobbies and personal interests.

Ensuring young people can access learning opportunities,

leisure and work; providing young disabled people the chance to take a break or be part of organised developmental initiatives. We will develop further the Government's drive to increase opportunities through apprenticeships within the work place and learning environments.

Working in partnership, we want to increase our work with people with learning disabilities within Northumberland; working closely with the Local Authority, being one of the eight selected providers to

develop new opportunities for this customer group in Northumberland.

Our vision can only be achieved with the skills of our employees and the quality of the work they do; and we plan to invest in key learning and development opportunities for our workforce to support them in this.

Right2Work and Oaklea Trust are both strong and healthy organisations and we will continue to strive to improve our offer to all our current and future customers.

Clive Wigley

Chief Executive



INDIVIDUALS

Over the last 12 months we have continued to strive for improvement in the standards of care and support for our customers.

Our adult care homes have achieved GOOD CQC ratings, greater security of tenure for our Cumbria customers, and have become Dignity Champions in Northumberland.

We have implemented minimum call times for our Home Care customers to improve the quality of service they receive and we have signed up to the Heath Care Charter.

We have improved our financial viability through some consolidation of the Home Care work that we undertake in Cumbria, our partnership working with Adult Social Care, closely managing vacancies with accommodation based support and reviewing costs to our private customers.



This has helped us to improve the terms & conditions of employment for our front line support staff.

Our future goals are to provide further access to training, education and work opportunities especially for our customers in Adult Care; we will strive to provide additional community and social activities for our Home Care customers and create partnerships promoting Dignity in Dementia.

Our Supported Living services will implement easy to read tenancies to support our



customers understanding of their responsibilities and improve access to assistive technology; promoting choice and independence.

Our Right2Work Community Interest Company will also be focussed on extending the range of skills and training offered through The Furniture Warehouse and our other community based learning opportunities to help with finding and maintaining employment as well as supporting customer independence.

CELEBRATING

EMPLOYEES

We are privileged to have such a skilled, dedicated and engaged workforce at Oaklea and we really value the high quality of services they deliver.

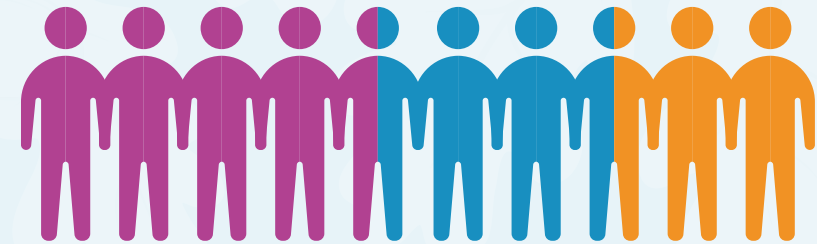
To support our employee development, we promised to offer more incentives, improve payroll systems and build on volunteering.

We now have a partnership with Sovereign Healthcare providing a health cash plan for all employees, we have implemented the Skills for Care Manager Induction Standards to support the continuing professional development of our managers and we encourage external qualifications where possible.

We have also achieved a bronze level award from STC Payroll Giving as a significant number of our employees give to charities directly from their pay.

Over the next two years we plan to develop more bespoke training for our employees in autism, dignity in dementia and positive behaviour support. We will be introducing Skills for Care Induction standards for our Team Supervisors and developing more training through the Apprentice Levy scheme.

Oaklea Employees - Years of Service



47% of our employees have worked with us for up to 5 years

28% of our employees have worked with us between 5 & 10 years

25% of our employees have worked with us for more than 10 years

Oaklea Employees - Roles



83% of our employees work in care and support roles

8% of our employees work in management roles

5% of our employees work on a voluntary basis

4% of our employees work in administration roles

This year we have changed our celebration of employee success and Oaklea now has five categories of award. Our congratulations go to:



1

Sarah Jones – Appleby Hub Team

Winner of “Healthy Living Promoter” Award 2017

Sarah has succeeded in creating a wonderfully inclusive and welcoming space at the Hub which is proving to be a real asset to the community of Appleby.



2

Nichola Bainbridge – Supported Living North East

Winner of “Outstanding Fundraiser” Award 2017

Nichola was the driving force behind the successful John Street Jammers and Wishlist week 2016.



3

Karen Rangecroft – Home Care Team

Winner of “Customer Choice” Award 2017

Karen received the most customer votes to achieve this recognition in 2017.



4

Michelle Parker – Supported Living North East

Winner of “Outside of the box thinker” Award 2017

Such a positive enthusiastic employee; Michelle always looks for ideas to improve and enhance the life of her customers. Michelle always has the best interests of the customers at the heart of what she does.



5

Gillian Curwen – Central Team

Winner of “Calm in the eye of the storm” Award 2017

Gillian is always calm, happy to help, and really knowledgeable in all aspects of Oaklea. She has performed above and beyond our expectations.







CELEBRATING

STRONGER COMMUNITIES

We work and engage with a wide and diverse range of communities and the people that live in them and our goals for the coming year are to continue to support these partnerships.

We will continue our partnership with Riversiders Trust and support them to run the Mencap Beacon Flag Ship Club for adults with learning disabilities in South Lakeland; developing further smaller groups aimed at specific age ranges to meet socially or learn new independent living skills.

We plan to continue working with other third sector organisations, such as our Building Better Opportunities work with Cumbria CVS; this project will support individuals facing barriers to work to move towards and into employment by supporting them to play a greater and more active role in their community.

And of course we will continue to develop new opportunities for learning, life and social interaction at the Appleby Hub including a new youth project; Hub WEB (where everyone belongs).



Clockwise from top left; Appleby youth project, Golden Moments Afternoon Tea, Riversiders, Appleby Hub

INNOVATION

What is Innovation? We think it's changing the way we do things to better respond to the needs and aspirations of our customers and our organisation.

Over the last 12 months

Oaklea has increased the areas of skills training at the Furniture Warehouse with the introduction of new tutors in Upholstery and Electrical Maintenance; made a strategic decision to relocate the Right2Work premises to improve the working environment and the retail environment for our customers; and begun supported employment contracts in North Yorkshire and Lancashire.

We have also improved our communications with partners, fundraisers and customers and increased our use of digital media to better engage with our stakeholders.

We have also invested in the technology used by our employees; enhancing our employee offer.

Our goals for the future are to continue to make strong links with other charitable foundations in order to access funding and put together a formal funding strategy; we will become partners in the Experts by Experience panel and become Special Olympics Ambassadors; our Right2Work team are planning support for young people to move closer to employment with work placements in Lancashire and Cumbria; and we will continue to encourage and support business development ideas through 'Oaklea does Dragon's Den!'



Top: Upholstery training at Furniture Warehouse

Bottom: Dragon's Den winners

WORKING TOGETHER

The Oaklea Trust prides itself in working collaboratively with others.

Successful partnership working has assisted disabled and vulnerable people in achieving outcomes essential for full participation and citizenship within society.

This year, like every year, we have collected feedback from our customers and stakeholders. We use the results to inform our planning procedures and we address any issues that arise. We also like to circulate the positive comments that come out of it too!

Along with the many organisations we have worked with this year on bespoke projects and those we continue to work within provide much longer term services we also work with our regulators. The Care Quality Commission (CQC) are the independent regulator of health



and adult social care in England.

Our goals for the coming year involve a lot of working with others!

Right2Work will be developing partnerships with further education colleges to provide supported internships; we will be actively pursuing tenders to provide future services; we aspire to bring together our customers to discuss the service we provide and seek their views through customer forums and we will be seeking more outstanding ratings from our regulator!

We will also be building on volunteering opportunities across the organisation and in partnership with others.

For more information about the Oaklea Trust, the services we provide or to find out ways in which you can help support us or work with us, please just get in touch through our website or social media pages.



Oaklea pays the Living Wage Foundation Minimum Wage



**Extract from Oaklea Trust
Financial statement year
ending 31st March 2017**

Income

Donations	1,117
Grants	42,480
Fundraising Events	9,221
Interest Received	93
Charitable Activities	7,378,943

Total Income £7,431,854

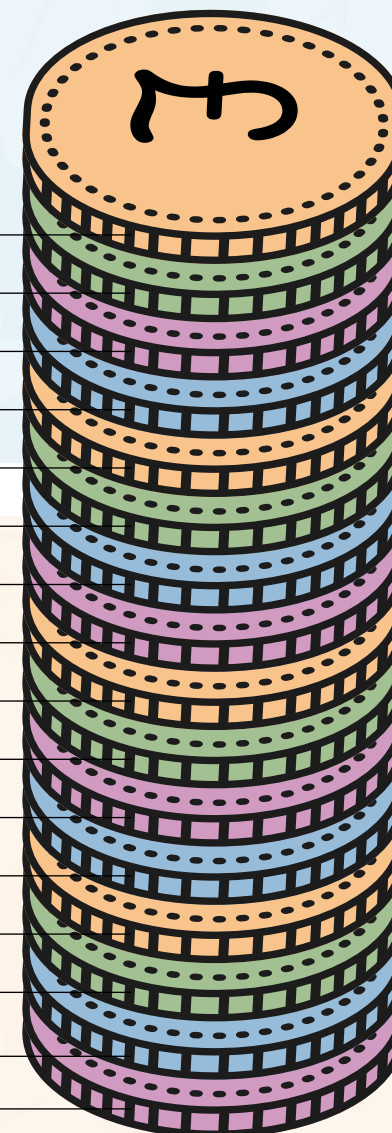
Expenditure

Staff and related expenditure	6,448,486
Property & Estate Costs	302,232
Professional & Legal Fees	177,596
Other Overheads	213,992
Financing Costs	16,493
IT Expenditure	150,512
Total Expenditure	7,309,311

Surplus £122,543

For every £100 of income here's what we spent it on in 2016/17...

Wages paid to employees	£75.90
Tax and pensions paid	£6.60
Rent and utility bills	£3.50
Travel expenses	£2.20
IT costs	£2.00
Transfer to reserves	£1.60
Professional fees	£1.40
Payments to subcontractors	£1.30
Depreciation	£1.20
Insurance, registration fees	£1.00
Administration costs	£0.90
Training	£0.80
Furniture, equipment and repairs	£0.70
Advertising	£0.50
Grants to individuals	£0.20
Bank and loan costs	£0.20



CELEBRATING FUNDRAISING

Last year our goals were around continuing to engage with new and existing donors and increasing the number of donors to the charity as well as improvements in communication with customers around payments.

In the year 2016/17 we raised a further £9,221 for the Wishlist Fund and we awarded grants of totalling £4,211.

Wishlist accepts applications all year round, and provides grants of up to £500. to find out more about the grant criteria and to download an application form visit www.oakleatrust.co.uk/about-us/wishlist.

Our goals for the next year include improvements in financial reporting software and promoting the fundraising opportunities for Wishlist through press releases and our social media.



From top;
Co-op cheque presentation,
FBS Smarties Challenge,
Mark Lowther's Great North Run Fundraiser





Supporting stronger communities


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